

Media Focus Ad Market Trend Report 2008/09

Monthly report on Swiss advertising market

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1. Data month September 2008: Highlights

Did the economically negative trend influence the gross advertising pressure? Compared to the previous period the gross advertising pressure decreased by 2.1% in September. Nevertheless the cumulative plus for 2008 is still 4.7%. If the actual advertising year will finish with a positive result at the end, that remains to be seen.

The cumulative minus of 9% in the key market **“Finance”** is not astonishing as the month September closes with -10% compared to the same period in 2007. The importance of this market appears when it gets compared with the other markets. **“Finance”** is the third biggest advertising market, just after the markets **“Automotive”** and **“Food”**, which had a cumulative plus of 5.6% respectively 4.5% for 2008.

The unbeaten leader in the advertising year 2008 (+34.4% YTD) is the key market **“Consumer Electronics/ Photo/ Motion Pictures”** which had the first negative monthly trend in 2008 with a minus of 22.3% compared to September 2007. The same situation occurred for the market **“Watches and Jewelry”**, which decreased by 10.3%. Year to date this market still shows a strong plus of 23.3%, which is the second highest growth compared to all markets.

Although the product *“Rivella gelb”* was the most intensive advertised product in September 2008, the key market **“Beverages”** lost 3.4% compared to September 2007.

The advertising markets **“Energy (+45.2%)”** and **“Cosmetics/ Body Care (+30.0%)”** closed with a very positive trend in the advertising month September.

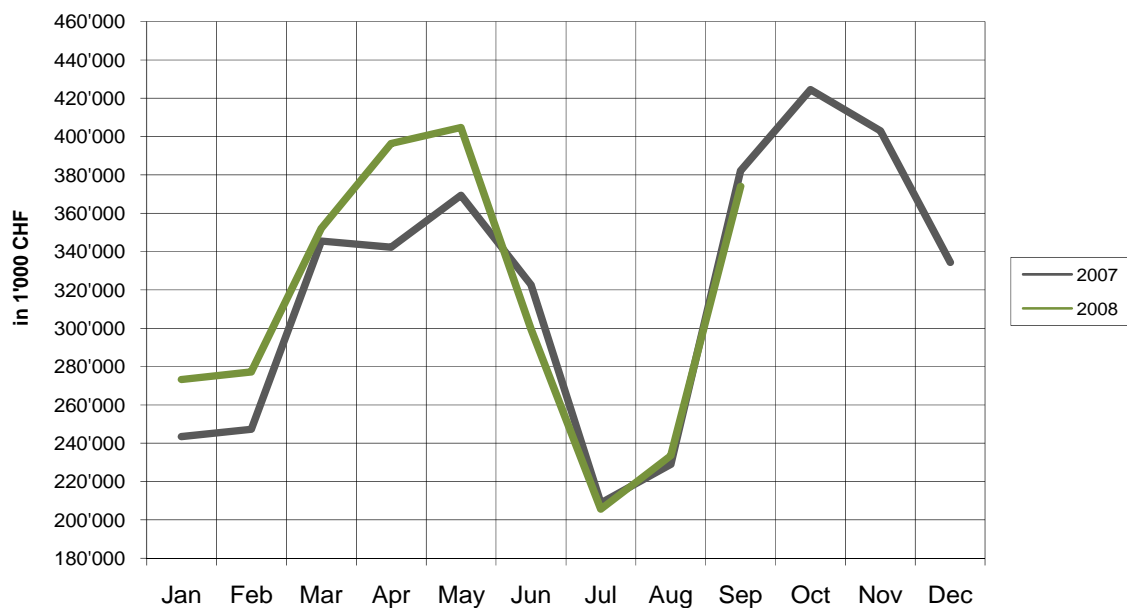
2. Evolution advertising pressure total market

Chart: Advertising pressure trend 2008 (update September)

Month	2007	2008	+/- %
	TCHF	TCHF	
January	243'303	273'204	12.3%
February	247'121	277'204	12.2%
March	345'331	352'153	2.0%
April	342'173	396'408	15.9%
May	369'299	404'795	9.6%
June	322'634	299'444	-7.2%
July	208'715	205'494	-1.5%
August	228'964	233'446	2.0%
September	382'218	374'019	-2.1%
October	424'441	0	
November	402'787	0	
December	334'313	0	
year to date	2'689'758	2'816'166	+4.7%

To avoid instability in the trend analyzes, the branch *Events* is not part of the monthly Advertising Market Trend until May 2009. (till back data are available)

Chart: Monthly advertising pressure trend compared to previous year (update September)

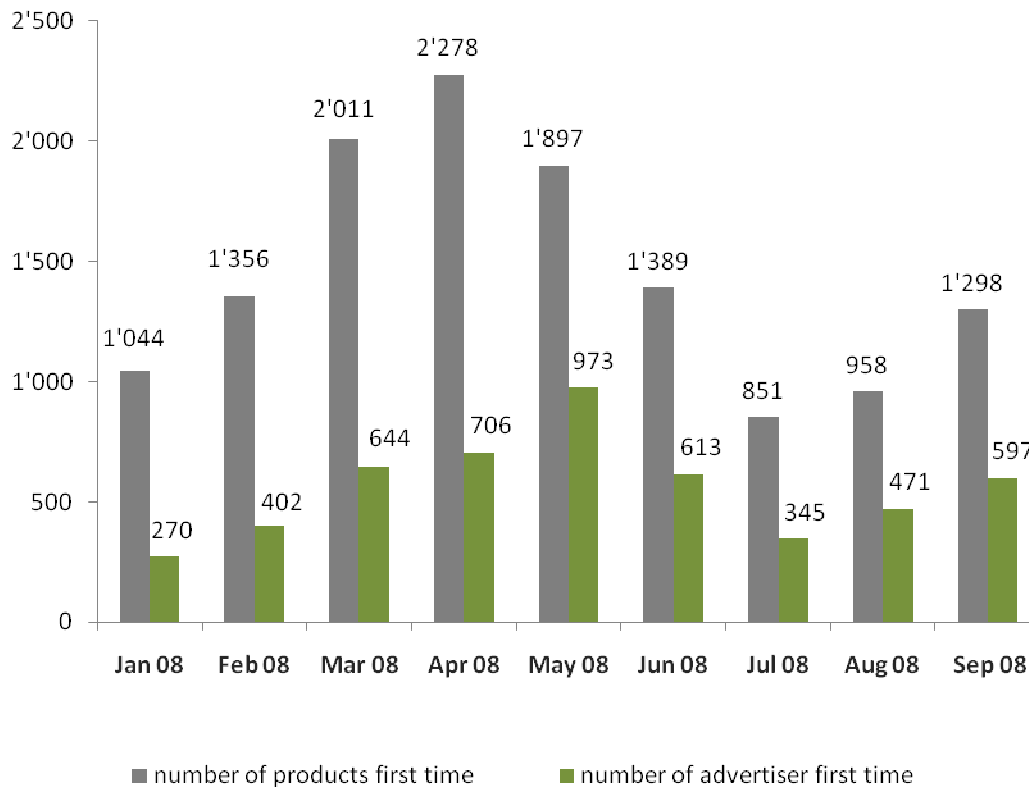


3. Evolution advertising pressure per key market

Position	Key Market	September 2008		2008 cumulative	
		TCHF	+/- PY %	TCHF	+/- PY %
	All key markets	374'019	-2.1	2'816'166	4.7
1	Clothes / Sports / Leisure	19'778	11.8	95'323	-4.0
2	Services	19'965	0.2	147'907	10.9
3	Energy	2'796	45.2	17'715	-14.3
4	Automotive	43'520	2.6	297'911	5.6
5	Finance / Insurances	44'164	-10.3	253'925	-9.0
6	Public Benefits	9'951	21.7	63'858	5.7
7	Beverages	11'660	-3.4	106'282	6.3
8	Household Devices	13'188	13.6	96'050	4.8
9	IT	3'808	-17.1	31'871	-23.8
10	Cosmetics / Body Care	28'725	30.0	199'159	13.2
11	Furniture / House / Garden	16'518	-1.6	123'380	-3.5
12	Food	31'690	3.2	259'316	4.5
13	Pharma / Health	9'953	18.7	77'187	6.8
14	Political Campaigns	5'103	-62.6	37'556	-9.7
15	Tobacco	1'027	-37.1	9'720	-10.7
16	Telecommunications	16'961	-11.3	155'562	2.9
17	Tourism / Transport	20'723	6.9	165'931	9.4
18	Entertainment Dev./ Photo/ Motion Pictures	9'687	-22.3	123'416	34.4
19	Watches / Jewelry	4'063	-10.3	42'036	23.3
20	Other smaller markets	26'384	-8.1	190'775	6.0
21	Assortment Advertising*	22'126	4.2	209'119	9.9
22	Image Advertising*	12'231	-23.1	112'168	6.1

* not being allocated to a certain market

4. New advertiser and products year to date



5. TOP 10

Top 10 advertiser (September 2008)

position	advertiser*
1	COOP
2	MIGROS
3	L'ORÉAL
4	PROCTER & GAMBLE
5	SUNRISE COMMUNICATIONS AG
6	SWISSCOM
7	MANOR
8	NESTLÉ
9	BEIERSDORF AG
10	COCA COLA BEVERAGES AG

* product-, assortment- and image-advertising

Top 10 products (September 2008)

position	products*
1	RIVELLA GELB
2	AXA WINTERTHUR FAHRZEUGVERSICHERUNG
3	SWISS LIFE VORSORGEVERSICHERUNG
4	HENNES + MAURITZ DAMENKLEIDUNG
5	SWISSCOM FIXNET DSL
6	COCA COLA
7	CITROEN C5 TOURER PKW
8	MITSUBISHI OUTLANDER SUV
9	MALBUNER WURSTWAREN
10	APPLE IPHONE 3G

* product-advertising [branding];
without assortment- and image-advertising

6. Allocation of advertising pressure per media group

Chart: Allocation of advertising pressure per media group in September 2008

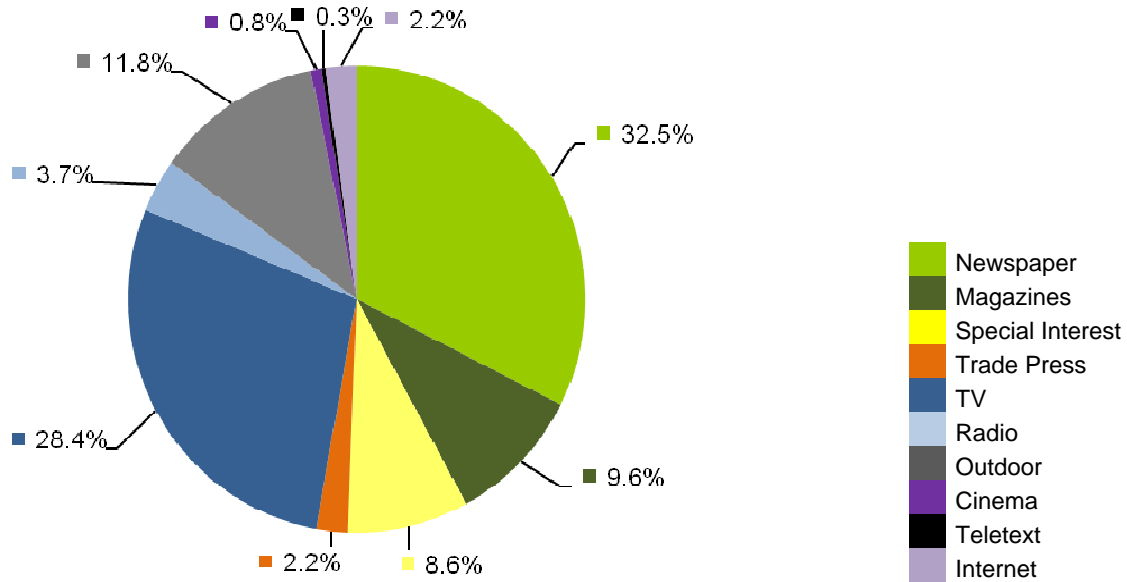


Chart: Allocation of advertising pressure per media group Year to Date as per September 2008

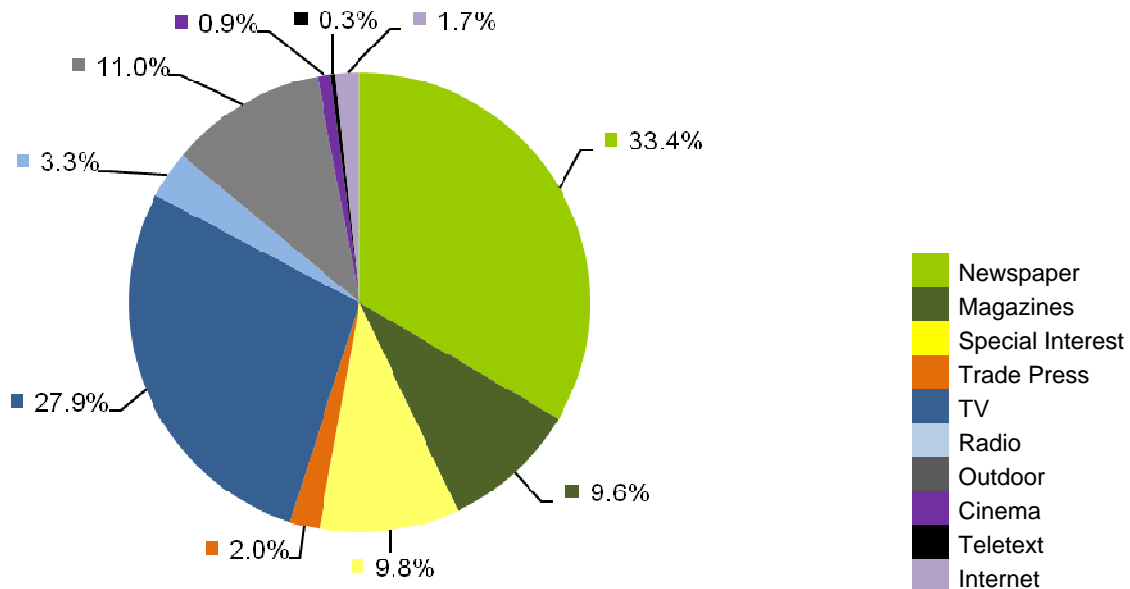
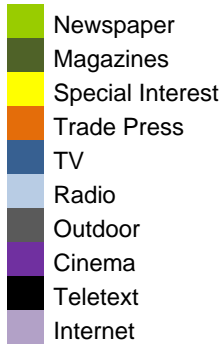
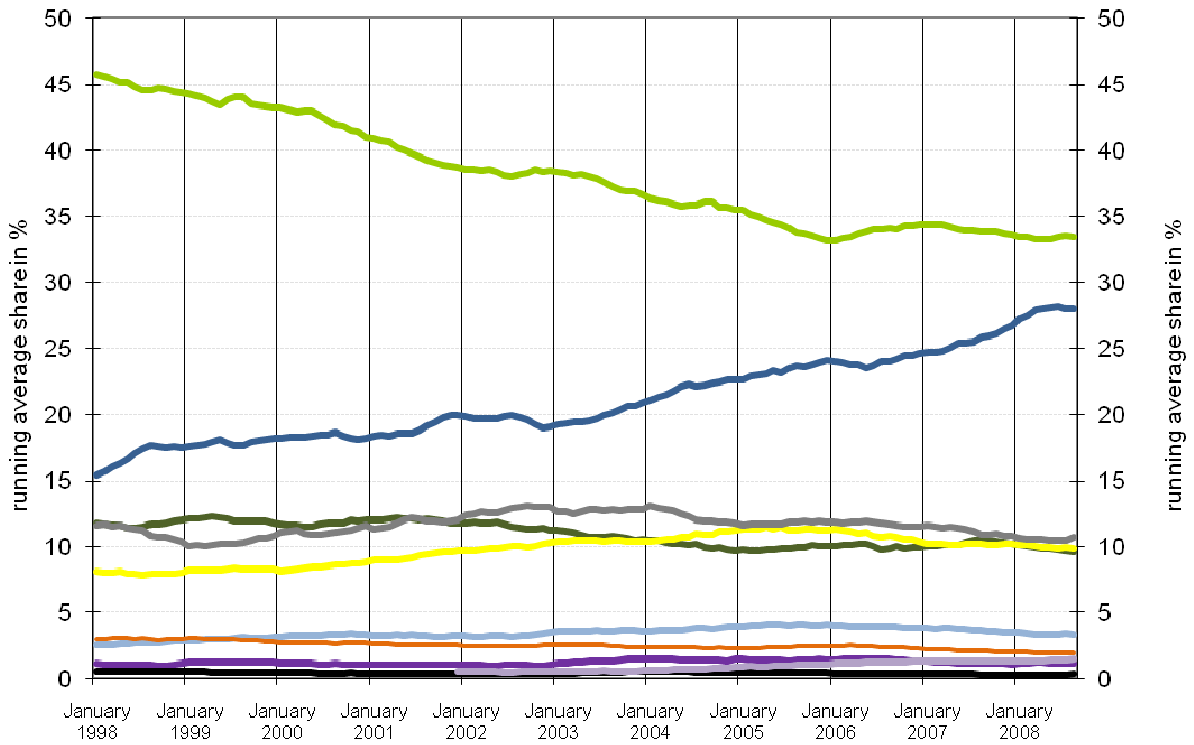


Chart: Monthly running average advertising pressure allocation in the media groups



About Media Focus

Since 1990 Media Focus tracks the Advertising Pressure within Switzerland of any Advertisement being allocated to the following Media Groups: Newspaper, Magazines, Special Interest, Trade Press, TV, Radio, Outdoor, Cinema, Internet and Teletext.

The Advertising Pressure Statistic scopes the relevant Core Markets and focus is set on brands and products in terms of classification. The Swiss level of data details is unique, whereas intense and severe analyses are applicable for beneficial market insights.

The methods of the Advertising Pressure Statistic are based on „gross media tariff perspective“, i.e. clearly indicates the Pressure received by the media consumer. As such Media Focus adheres to international Standards in measuring Advertising Pressure.

As a Joint Venture of the two famous Global Research Companies - IHA-GfK AG and The Nielsen Company - Media Focus is proud of being part of worldwide leading networks in terms of Advertising Research, Consumer Panel Research, Retailer Business and Media Research.

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